

Council on Postsecondary Education
July 19, 2004

2004-05 Strategic Planning Process
Update and Discussion

At its May 2004 regular meeting, the Council initiated a comprehensive strategic plan update process. This agenda item reports on activities that have taken place in the initial phases of the process and outlines next steps for discussion with the Council.

Phase 1: Planning Process Design

During the design phase of the planning process, the Council staff sought the advice of a number of individuals and groups. Meetings were held with the president and key staff on each of the public institution campuses, staff of the Legislative Research Commission, members of the Executive Branch (including the Governor's Executive Cabinet Secretary, Secretary of the Education Cabinet, State Budget Director and staff), the Kentucky Higher Education Assistance Authority/Kentucky Higher Education Student Loan Corporation, the State Board of Education, the CPE Committee on Equal Opportunities, the Inter-Alumni Council, the Statewide P-16 Council, and the Prichard Committee (at its annual meeting scheduled for July 11). A meeting with representatives of the independent sector had to be rescheduled but is forthcoming. The general response to the broad outline of the planning process was positive, and participants welcomed the opportunity to react to the staff's proposals and make suggestions.

Results of these and internal staff discussions provided the groundwork for a conversation with the Council's Executive Committee July 1, 2004. At that meeting, members made a number of suggestions for the staff to consider. They include:

- *Extending the timeline further into 2005 to allow more time for constituent discussion.* The original timeline was designed such that the key elements of the public agenda and statewide action agendas were outlined in time for the 2005 legislative session. It also proposed scheduling campus forums in conjunction with regional forums this fall. The Council members suggested that more time be provided for plan development, and made the specific suggestion to move the campus forums to later in the process so that the results of the regional forums could be shared with the campus communities as they developed their plans and reviewed their mission statements.

- *Engaging statewide, regional, and local groups in the creation of the invitation list for the regional forums.* A number of suggestions were made about the invitees to the regional forums, including the involvement of the AFL/CIO, Kentucky League of Cities, and the Association of Counties in the development of the invitation list.
- *Other Comments.* A number of other comments were made by the members, including:
 - Emphasis on regionalization in data presentation and goal-setting
 - Identification of changes in legislation desired in 2005 versus 2006
 - Alignment of the planning process with the funding model review and budget recommendation for the next biennium
 - Support for a very brief document outlining the broad public agenda
 - Recognition of the role that for-profit providers play in the system

Next Steps:

The Council staff is making suggested changes to the planning timeline and will provide an update at the July Council meeting. Current thinking is to have all documents finalized and published in time for the September 2005 trusteeship conference. This end date also is consistent with the funding model review timeline, i.e., plans will be completed in time to guide the development of the Council's 2006-08 biennial budget recommendation.

The staff also is working with the local P-16 councils on arrangements for the regional forums. And they, along with other statewide and local business, community, advocacy, and labor groups, are being consulted on the invitation lists.

Phase 2: Data Analysis and Projections

By definition, a public agenda for postsecondary education requires a focus on people – the various populations that the postsecondary system is or should be serving. The 1997 reform legislation was preceded by such an assessment of demographic, economic, and education research to better understand what was needed to improve the standard of living and quality of life of Kentucky's citizens and the economic condition of the Commonwealth. These data formed the foundation of House Bill 1 and the Council's first public agenda, *2020 Vision*.

The Council staff is conducting a similar but more comprehensive analysis as background to the 2004-05 planning process. One added feature of the current analysis will be a focus on regional data (e.g., high school performance, participation in adult education, college-going and participation rates, and educational attainment rates). Both statewide and regional data will be presented at the regional forums slated for Phase 3 of the process.

A second addition to the current assessment will be a set of analyses and projections aimed at addressing these types of questions:

- How many students will be in the system by 2020 if Kentucky achieves its goal of being at or above the national average in education attainment?
- Does Kentucky currently produce enough degrees annually to close the gap by 2020? How many more degrees need to be produced above and beyond current levels of production? What increases in enrollment, retention, and graduation rates are needed?
- If these projections and goals are achieved, what impact will they have on Kentucky's personal income and tax base?

The Council staff is working with the National Center for Higher Education Management Systems and the Kentucky Long-Term Policy Research Center on these projections. The findings will be a part of the data presented to state-level policy makers and regional forum participants in fall 2004, beginning with the Institute for Effective Governance annual trusteeship conference in September.

An additional piece of information, which did not exist during the Council's first planning process, is the national report card on postsecondary education – *Measuring Up* – published by the National Center on Public Policy and Higher Education. The 2004 report card will be released in mid-September. Kentucky's results will be presented at the trusteeship conference by Peter Ewell, one of the nation's leading accountability experts, to provide an understanding of both the progress of the system relative to the rest of the country and the challenges Kentucky faces in charting a course for the next several years.

Phase 3: Development of Public Agenda and Statewide Action Agenda

Another distinguishing feature of a public agenda is the active solicitation of community feedback in its development. The focus is on communities and their postsecondary needs, not on individual colleges or their budgets. It is about building vibrant communities through the development of an educated workforce and the creation of good jobs through research and technology transfer.

The series of regional forums being planned in fall 2004 will be designed to solicit such feedback. The primary purpose of the forums will be to ask business, labor, community, and education leaders as well as students, parents, and the general public about their aspirations for their communities and region and the challenges they face – and how Kentucky's postsecondary system can help. What are we doing right? What are we missing?

Eight forums are planned across the state. The attachment shows the preliminary dates and locations. The proposed format includes: 1) welcoming remarks from CPE members and the CPE president, 2) an open discussion about community/regional needs with the entire audience (facilitator-led), 3) a data presentation (see Phase 2 above), 4) either a facilitator-led discussion or group work at round tables (depending on the number of attendees), and 5) a closing session. Additional comments will be sought via comment cards, a Web survey, and an online chat room.

The Council and its staff also will seek the advice of state policy leaders, reform partners, and business and labor leaders throughout this phase of plan development. For example, the Council staff has been asked to make a presentation at the August 9 meeting of the legislature's Interim Joint Committee on Education. The annual trusteeship conference will provide another opportunity for discussion of the data assessment and public agenda. And planning will be a standing agenda item on all quarterly SCOPE meetings over the course of the next year. The master calendar being developed by the staff will provide more detail about these and other opportunities to solicit input and advice from key constituents.

From these discussions, and building on the analysis of both statewide and regional data, a public agenda and companion action agenda will be drafted and distributed widely for review and comment. In addition, a summary of regional issues and needs will likewise be distributed – both to forum participants as well as to the postsecondary providers within a particular region. These documents in their final form will guide: 1) the establishment of a set of key performance indicators to measure progress in advancing the public agenda; 2) the development of mission parameters, plans, and performance indicators for the institutions across the system; 3) the development of the Council's 2006-08 biennial budget recommendation; and 4) the overall work of the postsecondary system in the coming years.

Phase 4: Development of Institutional Action Agenda, Mission Parameters, and Performance Goals

After consultation with the presidents, this final phase will be outlined in more detail for discussion at the September Council meeting.

DRAFT

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Regional Forums

Date	Time	City	Event	Site (tbd)
9-29-04	6:30-9 pm (ET)	Covington	Covington regional forum	
10-4-04	6:30-9 pm (ET)	Louisville	Louisville regional forum	
10-12-04	6:30-9 pm (ET)	Prestonsburg	Prestonsburg regional forum	
10-13-04	6:30-9 pm (ET)	Manchester	Manchester regional forum	
10-14-04	6:30-9 pm (ET)	Lexington	Lexington regional forum	
10-25-04	6:30-9 pm (CT)	Paducah	Paducah regional forum	
10-26-04	6:30-9 pm (CT)	Madisonville	Madisonville regional forum	
10-27-04	6:30-9 pm (CT)	Glasgow	Glasgow regional forum	